

Columbia MD Family History Center Temple and Family History Consultant In-service Training Letter, May 2017

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Consultant Planner

“Pre-Search” is the key to “Find, Take, Teach

Consultant Planner

If you have not already done so, please start using the Consultant Planner to facilitate the way you help people use FamilySearch to prepare names to take to the temple. To get to the planner, click on “Get Help” in the upper right corner of every page in FamilySearch, on the pull-down list click on the last item “Help Others.”

When your High Priest Group Leader assigns you a family to assist, use the “Invite” function, entering the name and email of the person being invited. When you click on “Send” an explanation page will appear, telling when the email will be delivered. Your list of invited people will go up by one. The software will send an email to the person telling him or her that you want to help. When the person clicks on “Yes” another screen is presented for them to give permission for you to use their account. When FamilySearch receives their approval, your number of invited people goes down by one and your list of people “Accepted or Added” will go up by one. You may want to send yourself an invitation understand the experience.

For each person on your list there is a “dashboard,” giving you insights into how active the person is in FamilySearch, how much their tree has been developed, and other interesting facts.

- From the dashboard there is a link to the current training for T&FH Consultants. If you have been in your calling for more than a couple of months, there will be something of value for you in that training

- There is also a link to help plan a 30-minute, one-on-one training session to give the person you are helping a good experience in finding someone to take to the temple.

“Pre-Search” is the key to “Find, Take, Teach

Your goal here is to discover a portion of the patron’s extended family where temple work needs to be done and there are ample “hints” to provide the information needed to fill in the personal profiles of the temple candidates with documented facts.

Although there is a “Descendancy View” in FamilySearch that can be helpful for “pre-search,” you may find that Puzzilla.org is more helpful. Here is a sequence for using “Puzzilla” for patrons with medium to well-developed pedigrees

- Log into Puzzilla as yourself
- Click on the “Change ID” button and type in the Person ID of the patron you are helping.
- When the “Retrieving” number stabilizes at 0 (zero), start on the left side of the tree to search (by hovering the mouse icon over the ancestors) for an ancestor born between 1790 and 1800 (this puts them far enough back that permission will not be needed, but recent enough that there is a good likelihood of finding records (and especially hints).
 - When you find the first one, right click to “pin” the pop-up to the screen.
- Click on the “Descendants” button and wait for it to resolve.
- Turn off the “Died < 16” and the “Born < 110” buttons. Turn on the “Targets” button.
 - Look for red flags (squares) that indicate people who have no children and were born more than 110 years ago.
 - Some families have all or most of the children with red flags
- Continue your “pre-search” by clicking on a child with a red flag,
 - and then clicking on “View in Family Tree.”
 - check to see the temple ordinance status—you often find that all or most of the temple work had been done (or that there is no sealing to spouse).
 - If there are any hints, inspect them, but do not attach anything—let the patron do that!!

- Run a query in “FamilySearch” to see if there are any other records that the “hint” process did not identify that will help with
 - a marriage and/or
 - a birth of a child (or more), and/or
 - several census records.
- You may need to use TreeSeek, “Source Tracker” to help them find all or most of the census records for the ancestor for whom you started.
 - If you do not find sources quickly, move on to the next ancestor in Puzzilla.
- You are looking for a child who grew up and does not yet have children in FamilySearch but has resources to expand the family tree
 - If FamilySearch does not have enough sources, look for some in Ancestry, FindMyPast, MyHeritage, AmericanAncestors, and/or Geneanet.
- Once you have identified a “gold mine” for your patron,
 - return to the Consultant Planner and under the name of the patron, devise a 30-minute presentation with enough detail that you will be able to guide the patron comfortably to the “gold mine” where the patron can have a fun/rewarding experience attaching the sources and filling out the profiles of parents and children to be able to take them to the temple.
- KEY INSIGHT: The job of the consultant is NOT to do the work for the patron, but rather to find a “gold mine” where the PATRON can enjoy doing the work. The underlying goal is to help the patron learn to love doing the work so that they will continue to come back for more, at first with the help of the consultant, but soon working on their own. Finding ancestors to take to the temple and then acting as a proxy on their behalf is the way to enjoy both halves of the blessing.